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World Production and Trade

United States
Department of
Agriculture

Foreign
Agricultural
Service

Washington, D.C. 20250

Weekly
Roundup

WR 41-87

Oct. 15, 1987

The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade.

GRAIN AND FEED

Policy Changes May Reduce SOUTH AFRICAN Corn Exports. South African corn exports in 1987/88 and in future years could be reduced as new policies take effect. These changes in turn enhance U.S. export prospects in major corn markets like Japan and Taiwan. These new policies are designed to limit corn production and cut export losses caused by the widening gap between high domestic prices and lower world prices. Recent good harvests will likely enable South Africa to export an estimated 2.6 million tons in 1986/87, but implementation of these policies would reduce exportable supplies and prevent South Africa from attaining its former position as a major corn exporter of 4-5 million tons annually. The U.S. agricultural attache in Pretoria forecasts South African corn exports at 1.3 million tons in 1987/88 (Oct/Sept).

OILSEEDS AND PRODUCTS

SOVIET and ARGENTINE Long-term Trade Agreement in the Wings. Argentine journalists report that the arrival of Soviet Chancellor Edward Schevardnadze is expected to result in the signature of a long-term trade agreement. If consummated, Argentina reportedly would agree to purchase \$1.1 billion of Soviet machinery and equipment prior to 1991 and the Soviets would increase purchases of Argentine grain and oilseeds. The agreement would help rectify the trade imbalance between the USSR and Argentina. Increased Argentine exports could displace both U.S. and European Community (EC) exports to the Soviet Union. However, Argentine grain trade contacts do not believe an agreement will be signed, and if it is, it will not have any real impact on Argentine grain exports. The current USSR-Argentine long-term agreement provides for 500,000 tons optional soybeans or soybean meal pellets annually until 1990.

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DAIRY, LIVESTOCK AND POULTRY

MEXICO Stops Feeder Cattle Exports. Mexican feeder cattle exports have been prohibited since September because the Mexican government and cattle producers have not agreed on a new export quota level. The Mexican cattle export season for 1987/88 began September 1 but no announcement of a new quota has been made because of disagreement between the two groups over domestic beef price levels. U.S. imports of feeder cattle from Mexico more than doubled in 1986 to over 1.1 million head, and imports during January-July 1987 totaled nearly 629,000 head. U.S. imports of feeder cattle from Mexico fell to an estimated 3,000 head in August, with no imports in September. Mexican exports of feeder cattle to the United States traditionally are low during August-October and reach their peak during November-March.

AUSTRALIAN Milk Output Up in 1987. In Australia, output of milk in 1987 is estimated at 6.3 million tons, about 2 percent higher than in 1986, according to the U.S. agricultural counselor in Canberra. Milk cow numbers are down about 3 percent for the same period. The major dairy state, Victoria, enjoyed favorable weather during March-June which was sufficient to boost production above the year-earlier level. With more milk available, output of cheese expanded to 177,000 tons, up 4 percent. Demand growth for non-cheddar type cheeses has been relatively strong and that has helped the whole cheese market. Output of butter and nonfat dry milk, at 104,000 tons and 120,000 tons respectively, are nearly the same as in 1986.

Milk Production in UNITED KINGDOM Falls in 1987. In the United Kingdom, 1987 milk output is forecast at 15.3 million tons, 6 percent below 1986, according to the U.S. agricultural counselor in London. The June 1987 census showed dairy cow numbers down 3 percent. The decline in milk production and cow numbers mainly reflects efforts being made to comply with the EC's 6-percent cut in delivery quotas for the 1987/88 marketing year (April/March). Again in response to the EC quota system, milk production is expected to decline another 2 percent in 1988.

With less milk available for processing because of declining production and an increase in consumption of fresh milk, 1987 butter and nonfat dry milk output, at 200,000 tons and 235,000 tons, respectively, are expected to be off over 10 percent. Cheese output at 265,000 tons is up about 3 percent due to more favorable market prospects. During the past year, EC regulations governing intervention buying have been tightened, reducing the opportunity to sell butter and nonfat dry milk to intervention agencies.

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POLAND'S Milk Production Declines. Milk production in Poland is expected to total 15.4 million tons in 1987, 2 percent below 1986, according to the U.S. agricultural counselor in Warsaw. Milk cow numbers for 1987 are reported at 4.94 million head, 5 percent below 1986. Approximately 0.6 million head of that total are on state farms while the remainder are privately owned. State farms are reported to be cutting dairy operations because they have a difficult time making a profit. Private farms also are shifting from dairy cows to hogs which offer better opportunities for profit. Despite the decline in milk production, output of both butter and cheese are expected to be up slightly because processors have lowered the fat content of butter, releasing it for other uses.

Early forecasts for 1988 suggest that additional incentive programs put in place in 1987 will be enough to stop the decline in milk cow numbers. However, feed supplies going into the 1987/88 winter are not as good as they were a year earlier and that factor may keep 1988 milk production below the 1987 level.

SPAIN'S Milk Output Slips. Spain's 1987 milk production is expected to total 6.15 million tons, about 2 percent below 1986, according to the U.S. agricultural counselor in Madrid. Milk cow numbers are reported at 1.36 million head for both years. Early forecasts for 1988 suggest milk output could decline by 2 percent, mainly in response to limitations imposed by the EC quota system.

Output of cheese during 1987 is expected to remain at the 1986 level of 110,000 tons. After sharp increases in 1986, output of butter and nonfat dry milk will be down in 1987 largely due to the lower level of milk production.

CREDIT NOTES

GSM-102 Action Announced for ECUADOR. USDA announced the details of Ecuador's \$54-million GSM-102 program. The coverage includes \$20 million for wheat, \$7 million for vegetable oils, \$5 million each for feed grains, solid wood products and breeding stock, \$3 million each for tallow, grease and cotton, \$2 million for planting seeds and \$1 million for animal milk replacer.

GSM-103 Actions Announced for ECUADOR and TURKEY. Ecuador's \$2-million GSM-103 program will cover purchases of U.S. breeding livestock. USDA announced a \$15-million line to cover breeding livestock exports to Turkey.

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WEEKLY EXCHANGE RATE DEVELOPMENTS

During the week ending October 9, the U.S. dollar declined moderately against all major currencies. U.S. banks raised their prime lending rate from 8.75 percent to 9.25 percent in response to an increase in long-term interest rates in West Germany and growing indications that Japan will also tighten credit. This was the fourth increase this year in the U.S. banks' prime rate and the highest in the last 18 months. The dollar's decline was softened by last week's monetary talks in Washington by the Group of Seven, continuing concern over the Persian Gulf War, and expectations that next week's U.S. trade report will show a narrowing trade deficit.

Currencies	Current	-----Percent change from-----		
	rate	week ago	month ago	year ago
	10/8/87	10/1/87	9/10/87	10/86
Argentine Austral	2.6303	4.25	16.07	146.28
Australian Dollar	1.3806	-1.93	.42	-11.77
Brazilian Cruzado	52.2900	1.65	6.62	276.81
Canadian Dollar	1.3060	-.07	-.94	-5.87
South African Rand	2.0619	-.92	1.44	-8.24
Thai Baht	25.8300	.27	.50	-.93
ECU	.8776	-1.10	.69	-9.04
British Pound	.6057	-1.02	-.21	-13.55
French Franc	6.0400	-1.37	.04	-7.97
West Germany Mark	1.8115	-1.50	.42	-9.69
Japanese Yen	143.9000	-1.50	1.12	-8.03
South Korean Won	805.8000	-.03	-.19	-7.69
New Taiwan Dollar	29.93000	-.33	-.43	-18.35

Exchange rates are spot as of 3 p.m. eastern time, October 8.

EXPORT ENHANCEMENT INITIATIVES

The status of USDA's Export Enhancement Program as of Oct. 8, 1987, was as follows in metric tons:

ANNOUNCED INITIATIVES	DATE ANNOUNCED	QUANTITY/RESULTS	
76. Tunisia vegetable oil	Sept. 24, '87	60,000	
75. Singapore frozen poultry	Sept. 24, '87	2,000	
74. Near East table eggs (Bahrain, Kuwait, Oman, Qatar, United Arab Emirates, Yemen)	Aug. 27, '87	50 million eggs	Sold 24.8 million eggs
73. Saudi Arabia dairy cattle	Aug. 27, '87	2,000 head	
72. Iraq barley	Aug. 10, '87	150,000	Sold 100,000
71. Brazil wheat	July 30, '87	300,000	Sold 66,000
70. Colombia wheat	July 30, '87	300,000	
69. Israel wheat	May 29, '87	200,000	

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EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

68.	Bangladesh wheat	May 22, '87	100,000	COMPLETE
		July 8, '87	50,000	COMPLETE
		Aug. 12, '87	150,000	Sold 144,500
		Sept. 11, '87	300,000	
67.	Soviet Union wheat	Apr. 30, '87	4,000,000	COMPLETE
66.	Turkey rice	Apr. 3, '87	70,000	Sold 12,000
65.	Colombia barley malt	Apr. 3, '87	15,000	
64.	Iraq table eggs	Feb. 20, '87	189 million eggs	Sold 178 million
63.	Canary Islands poultry	Feb. 9, '87	5,000	Sold 2,000
62.	Nigeria wheat	Jan. 28, '87	500,000	
61.	China wheat	Jan. 26, '87	1,000,000	COMPLETE
		Aug. 18, '87	1,000,000	COMPLETE
60.	Iraq wheat	Jan. 16, '87	800,000	Sold 715,000
59.	Switzerland barley or sorghum	Jan. 16, '87	250,000	Sold 9,000
58.	Poland wheat	Jan. 7, '87	500,000	COMPLETE
		July 2, '87	500,000	Sold 451,000
57.	Poland barley or sorghum	Dec. 31, '86	200,000	Sold 167,000
56.	Romania wheat	Dec. 23, '86	250,000	
55.	Iraq poultry	Dec. 22, '86	60,000	COMPLETE
54.	Dominican Republic table eggs	Dec. 9, '86	25 million eggs	Sold 11.1 million eggs
53.	Zanzibar wheat flour	Dec. 9, '86	20,000	Sold 6,000
52.	Tunisia barley	Dec. 1, '86	150,000	
51.	Gulf countries (Bahrain, Kuwait, Oman, Qatar, United Arab Emirates) dairy cattle	Oct. 30, '86	1,500 head	COMPLETE
		Aug. 27, '87	1,500 head	
50.	West Africa (Benin, Burkina Faso, Cameroon, Cote d'Ivoire, Ghana, Gabon, Liberia, Niger, Togo) wheat	Oct. 30, '86	345,000	Sold 116,200
		June 15, '87	185,000	
49.	Dominican Republic poultry	Oct. 29, '86	1,500	COMPLETE
48.	Philippines barley malt	Oct. 20, '86	60,000	Sold 25,000
47.	Cameroon wheat flour	Oct. 14, '86	20,000	
46.	Romania barley	Sept. 24, '86	200,000	Sold 125,000
45.	Venezuela barley malt	Sept. 4, '86	100,000	
44.	Cyprus barley	Aug. 26, '86	150,000	Sold 118,000
43.	Canary Islands wheat	Aug. 8, '86	100,000	
42.	Egypt semolina	Aug. 6, '86	30,000	Sold 23,000
		Sept. 29, 1987		Balance withdrawn
41.	Soviet Union wheat	Aug. 1, '86	4,000,000	EXPIRED
40.	Canary Is. dairy cattle	July 28, '86	3,000 head	Sold 2,985

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EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

39. Hong Kong table eggs	July 28, '86	44 million eggs	COMPLETE
38. Senegal wheat	July 17, '86	100,000	COMPLETE
	Sept. 11, '87	110,000	
37. India vegetable oil	July 8, '86	25,000	COMPLETE
36. Jordan barley	June 17, '86	60,000	COMPLETE
35. Israel barley	June 17, '86	200,000	COMPLETE
	Sept. 14, '87	200,000	Sold 13,324
34. Tunisia dairy cattle	May 29, '86	4,000 head	COMPLETE
33. Algeria dairy cattle	May 29, '86	5,000 head	COMPLETE
32. Sri Lanka wheat	May 16, '86	125,000	COMPLETE
	March 5, '87	95,000	Sold 85,000
	Aug. 20, '87	240,000	
31. Saudi Arabia barley	May 7, '86	500,000	COMPLETE
	Aug. 6, '86	250,000	COMPLETE
	Sept. 16, '86	300,000	COMPLETE
	Oct. 8, '86	200,000	COMPLETE
			(201,000)
	Jan. 5, '87	1,250,000	COMPLETE
	May 15, '87	500,000	COMPLETE
	Aug. 4, '87	500,000	COMPLETE
30. Algeria barley	Apr. 17, '86	500,000	Sold 108,000
29. Morocco dairy cattle	Apr. 16, '86	4,000 head	COMPLETE
28. Turkey dairy cattle	Apr. 16, '86	5,000 head	COMPLETE
	June 18, '86	5,000 head	
27. Egypt dairy cattle	Apr. 16, '86	6,000 head	COMPLETE
	Sept. 12, '86	10,000 head	Sold 3,501
26. Yemen poultry feed	Apr. 14, '86	150,000	Sold 111,468
25. Yugoslavia wheat	Apr. 10, '86	200,000	COMPLETE
	June 24, '86	200,000	COMPLETE
	Oct. 7, '86	500,000	Sold 417,050
24. Indonesia dairy cattle	Apr. 9, '86	7,500 head	COMPLETE
	June 18, '87	8,000 head	COMPLETE
23. Syria wheat	Apr. 8, '86	700,000	CANCELED
22. Benin wheat (remaining 15,000 tons transferred to West Africa)	Apr. 7, '86	45,000	COMPLETE
21. Algeria table eggs	Apr. 4, '86	500 million eggs	Withdrawn
	Sept. 29, '87		
20. Iraq dairy cattle	Apr. 4, '86	6,500 head	Sold 6,028
19. Jordan wheat	Mar. 19, '86	75,000	COMPLETE
	June 20, '86	75,000	COMPLETE
	Dec. 31, '86	225,000	COMPLETE
18. Tunisia wheat	Mar. 18, '86	300,000	COMPLETE
	Aug. 22, '86	800,000	Sold 300,000
17. Algeria wheat flour	Feb. 25, '86	100,000	
	Sept. 29, '87		Withdrawn
16. Algeria semolina	Feb. 11, '86	250,000	Sold 30,000

EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

15. Philippines wheat	Jan. 7, '86	150,000	COMPLETE (152,400)
	Aug. 10, '87	500,000	Sold 200,000
14. Zaire wheat	Dec. 27, '85	35,000	COMPLETE
	May 15, '86	45,000	COMPLETE
	Oct. 10, '86	40,000	COMPLETE
	July 16, '87	80,000	Sold 45,000
13. Nigeria barley malt	Dec. 10, '85	100,000	Sold 80,464
12. Iraq wheat flour	Dec. 9, '85	150,000	COMPLETE
	Jan. 7, '87	175,000	Sold 75,000
11. Egypt poultry	Nov. 26, '85	8,000	COMPLETE
	Mar. 21, '86	15,000	COMPLETE
	June 18, '86	5,000	COMPLETE
	July 8, '86	15,000	COMPLETE
	Dec. 19, '86	25,000	COMPLETE
	Feb. 27, '87	6,000	COMPLETE
10. Zaire wheat flour	Nov. 18, '85	64,000	COMPLETE
	May 15, '86	30,000	COMPLETE
9. Philippines wheat flour	Nov. 15, '85	100,000	Sold 50,000
	Sept. 29, '87		Balance withdrawn
8. Jordan rice	Nov. 8, '85	40,000	Sold 38,700
	Jan. 13, '87	60,000	
7. Turkey wheat	Oct. 16, '85	500,000	COMPLETE (506,600)
	May 8, '86	500,000	Sold 248,000
6. Morocco wheat	Sept. 30, '85	1,500,000	COMPLETE
	Dec. 9, '86	790,000	COMPLETE
	July 1, '87	500,000	Sold 310,000
5. Yemen wheat	Sept. 6, '85	100,000	COMPLETE
	Jan. 26, '87	100,000	COMPLETE
4. Yemen wheat flour	Aug. 20, '85	50,000	COMPLETE
	Apr. 14, '86	100,000	COMPLETE
	May 18, '87	100,000	Sold 50,000
3. Egypt wheat	July 26, '85	500,000	COMPLETE
	Oct. 30, '85	500,000	COMPLETE (512,500)
	June 24, '86	500,000	COMPLETE
	July 29, '86	52,000	COMPLETE
	Oct. 8, '86	1,000,000	COMPLETE
	July 8, '87	500,000	Sold 350,000
2. Egypt wheat flour	July 2, '85	600,000	COMPLETE
	Aug. 6, '86	600,000	Sold 356,000
1. Algeria wheat (ex durum)	June 4, '85	1,000,000	COMPLETE
wheat (ex durum)	Apr. 10, '86	1,000,000	Sold 616,000
durum	Nov. 10, '86	300,000	COMPLETE
durum	Mar. 16, '87	300,000	COMPLETE
durum	July 24, '87	300,000	Sold 244,000

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EXPORT ENHANCEMENT PROGRAM SUMMARY

Announced as of Oct. 8, 1987

Announced to Date 33,750,590 tons grains and products (grain equivalent)
 308 million table eggs
 152,500 tons frozen poultry
 77,000 head dairy cattle
 85,000 tons vegetable oil

Sold to Date 19,720,759 tons wheat
 2,101,466 tons flour (grain equivalent)
 4,259,324 tons barley
 72,610 tons semolina (grain equivalent)
 140,615 tons barley malt (grain equivalent)
 106,000 tons sorghum
 50,700 tons rice
 111,468 tons poultry feed
 25,000 tons vegetable oil
 137,499 tons frozen poultry
 58,514 head dairy cattle
 257,773,548 table eggs

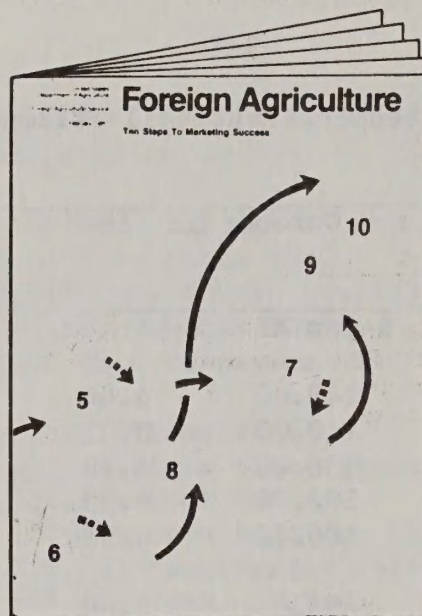
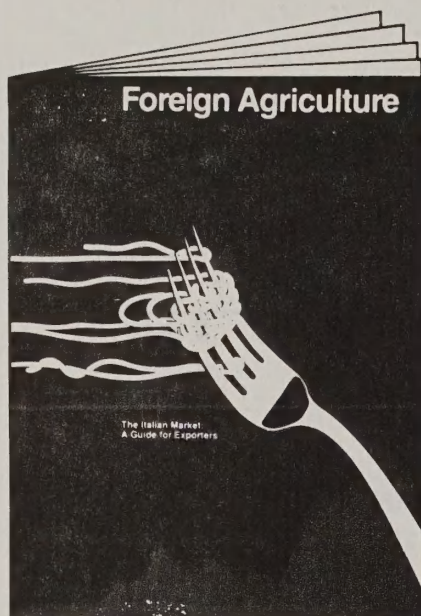
Total Sales Value: \$2,504.9 million
Estimated Bonus Book Value: \$1,739.9 million
Market Value of Awards: \$1,218.7 million

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Selected International Prices

Item	: October 13, 1987	: Change from	: A year
	:	: a week ago	: ago
ROTTERDAM PRICES 1/	\$ per MT	\$ per bu.	\$ per MT
Wheat:			
Canadian No. 1 CWRS-13.5%.	149.00	4.06	+1.50
U.S. No. 2 DNS/NS: 14%....	140.00	3.81	+2.50
U.S. No. 2 S.R.W.	136.00	3.70	+3.00
No. 3 H.A.D.....	160.00	4.35	-3.00
Canadian No. 1 A: Durum...	166.50	4.53	-1.00
Feed grains:			
U.S. No. 3 Yellow Corn....	94.00	2.39	-0-
Soybeans and Meal:			
U.S. No. 2 Yellow.....	215.40	5.86	-1.95
Brazil 47/48% Soya Pellets	227.00	--	-5.00
U.S. 44% Soybean Meal.....	206.00	--	-7.00
U.S. FARM PRICES 3/			
Wheat	94.42	2.57	+1.47
Barley.....	59.25	1.29	-0-
Corn.....	60.24	1.53	-0.79
Sorghum.....	54.67	2.48 2/	-0-
Broilers.....	959.88	--	-12.57
EC IMPORT LEVIES			
Wheat 5/.....	208.57	5.68	+2.16
Barley.....	207.14	4.51	+2.12
Corn.....	188.12	4.78	+2.77
Sorghum.....	194.34	4.94	+2.19
Broilers 4/ 6/ 8/.....	508.00	--	-0-
EC INTERVENTION PRICES 7/ 9/			
Common wheat(feed quality)	182.75	4.97	+1.12
Bread wheat (min. quality)	192.37	5.24	+1.19
Maize.....	192.37	4.89	+1.19
Barley and all other feed grains, excluding maize.	182.75	--	+1.12
Broilers 4/ 6/.....	1,564.00	--	+23.00
EC EXPORT RESTITUTIONS (subsidies)			
Wheat	131.61	3.58	-2.44
Barley.....	139.02	3.03	+3.78
Broilers 4/ 6/ 8/.....	421.00	--	-0-

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Five-day moving average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 9/14/83 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/ Reflects change in level set by EC. 9/ Changes may be due partly to exchange rate fluctuations and/or ECU payments. N.A.=None authorized. N.Q.=Not quoted. Note: Basis October delivery.



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